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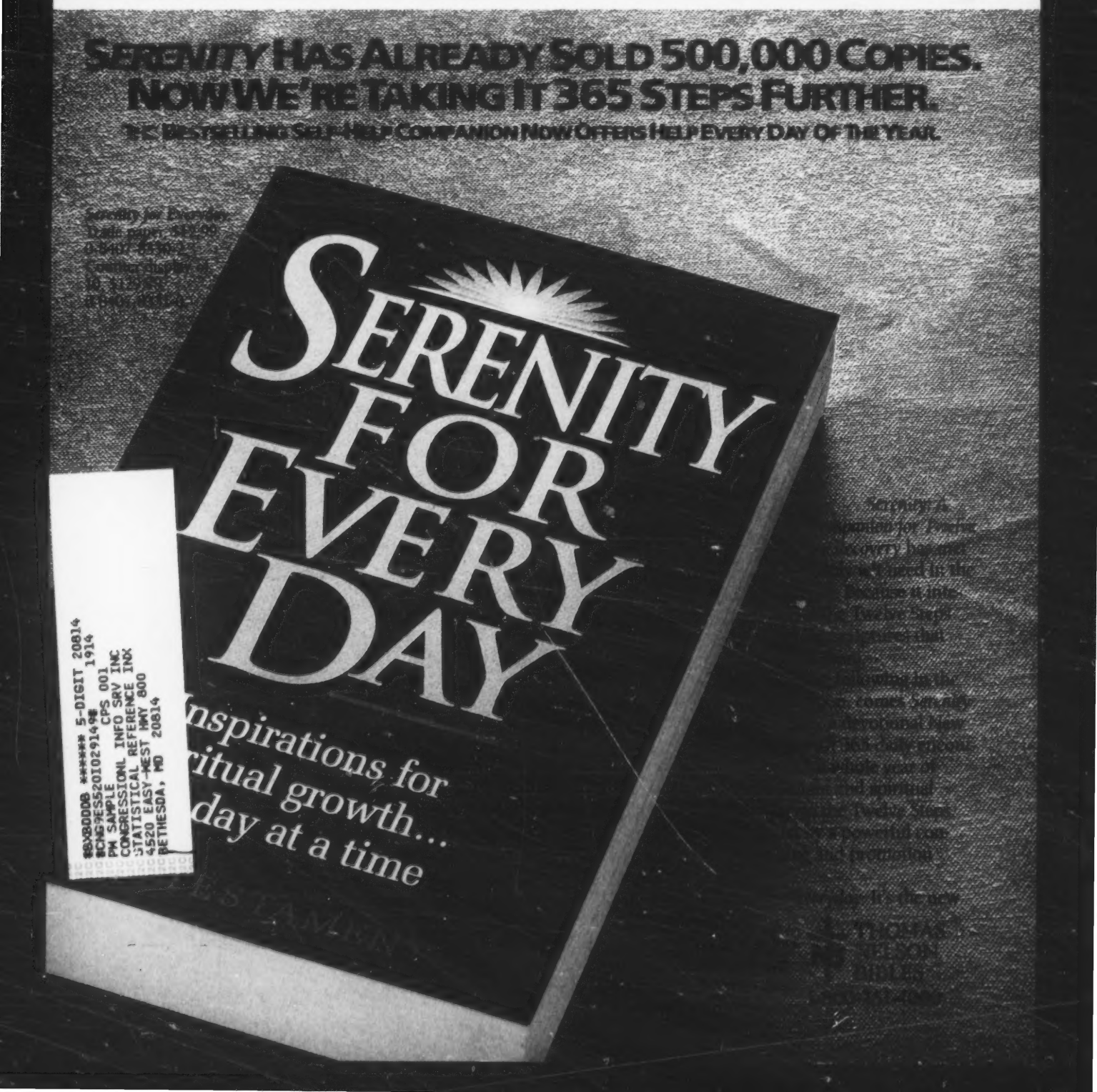
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VOLUME 239 NUMBER 45
ISSN 0000-0019

THE INTERNATIONAL NEWS MAGAZINE OF BOOK PUBLISHING

OCTOBER 12, 1992

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Walden Parent Kmart Buys Borders Chain

Plans for the 19-unit superstore chain remain unclear

Kmart Corp. has signed an agreement to acquire Borders Inc., a fast-growing group of 19 superstores, which had filed its first public offering on August 12.

Under the terms of the deal, estimated by some to amount to about $190 million, Kmart will issue convertible preferred stock in exchange for all outstanding Borders stock.

In the initial offering, Borders had wanted $13 to $15 a share for 3.6 million shares, or 28% of all shares, the vast majority of which are owned by founders Louis and Thomas Borders.

Kmart's Walden subsidiary had opened a handful of superstores over the past few years but began opening superstores in earnest only this past June, when its first Basset Book Shop opened. It has just three Basset superstores now, compared to the more than 100 operated by rival Barnes & Noble. Although Basset planned to open 15 to 20 superstores by the end of the year, the purchase of Borders gives Kmart a big boost in the superstore race. (Kmart indicated that Borders's expansion plans—eight to 10 stores next year, "up to 14" in 1994—will continue.)

Maureen O'Brien

***Charles Cumello** of Waldenbooks will meet with Borders soon.*

The Kmart purchase comes just a week after Barnes & Noble withdrew its initial public offering in the face of a lack of enthusiasm on Wall Street.

Contacted by *PW*, Walden CEO Charles Cumello said that Basset "will continue with its strategy for now, as will Borders." Although he confirmed that Borders will join the Kmart Specialty Retail Group, Cumello did not say how the two bookselling enterprises will work together. "We'll be meeting with Borders soon to know what the long-term situation will be for the both of us," he said. Cumello also indicated that Borders president Robert DiRomualdo will remain in that position.

The Talk of GLBA

Still, at the Great Lakes Booksellers Association trade show in Cleveland October 2–4, which began the day Kmart announced its purchase of Borders, the sale was a major topic of conversation among booksellers and publishers. Participants expressed concern that the two largest national book retailing chains are becoming ever larger. One owner of a major independent feared that if the chain superstore strategy, which even its proponents have termed a calculated gamble, fails, many small publishers will be ruined and large ones will have severe problems, which in turn will adversely affect independents.

One executive from a major New York publisher, who did not wish to be identified, said that despite their emphasis on backlist, the chain superstores have not increased his company's business in that area. It is the large independent stores that are "our bread and butter," he said. "They're the ones responsible for increasing our backlist sales. I fear for them."

Several booksellers noted that the Borders purchase made for a return to the old Dalton-Walden rivalry of the '70s and '80s, but with a new twist. Where once the war was waged in American malls, this time, due in part to decreased mall traffic and the inroads made by price clubs and WalMarts into sales of discounted bestsellers, the battle for buyers of mid- and backlist books will be waged in non-mall locations, right where the independents are.

—JOHN MUTTER and MAUREEN O'BRIEN

AAP Sales Report for August

Category	% change, August*	% change, YTD
Adult hardcover	-13.8	16.8
Adult paperback	2.7	10.1
Juvenile hardcover	-2.3	4.6
Juvenile paperback	-1.4	6.7
Univ. pr. hardcover	22.0	-2.2
Univ. pr. paperback	2.1	9.4
Bibles, etc.	-55.0	-0.4
Mass market paperback	-9.1	2.3
Book club	0.6	0.3
Mail order	-11.4	-21.8
Sci-tech	2.9	14.3
College texts	1.4	5.6
School texts	-2.6	-3.2

**Percent changes measured against same time periods, 1990.*

Knopf's Ann Close Wins Roger Klein Award for Editing

Ann Close, an editor at Knopf, has won the 1992 *Publishers Weekly*/Roger Klein Award as an oustanding editor—the second time in a row a Knopf editor has won (the last Knopf winner was Barbara [Bobbi] Bristol in 1990).

Thomas Wallace of the Wallace Agency, Roger Klein administrator and chairman of the judges committee for the award, said of her: "In a particularly good year, with an outstanding group of nominated editors, Ann's remarkable list, and the skill and understanding with which she nurtures her authors, made her an obvious first choice."

Other candidates this year, nominated by publishers, authors or agents, were Jacqueline Cantor of Dell/Delacorte, Roger Conover of the MIT Press, Joyce Engelson of Crown, John Glusman of Farrar, Straus & Giroux, Daniel Halpern of Ecco Press and *Antaeus* magazine, Richard Kot of HarperCollins, Kate Medina of Random House, Allen Peacock of Henry Holt, James Silberman of Little, Brown, and John Sterling of Houghton Mifflin.

The Klein award is given biennially to a book editor for outstanding achievement in terms of building a list, dealing with authors and nurturing their books. It is named for a young editor who died more than 20 years ago. Presentation will be made at an awards ceremony scheduled for early November, in conjunction with the National Poetry Series award for a poetry editor.

The Roger Klein judges also made a special citation for editor Harvey Ginsberg, who retired recently at William Morrow after a 35-year publishing career embracing many houses.

Publishers in Migration

Statistics show that the book business has moved substantially south and westward during the past decade

ALBERT N. GRECO

Between 1977 and 1987, the U.S. experienced a massive demographic shift that directly affected its social fabric and business infrastructure. The migration of thousands of individuals and corporations away from large Eastern and Midwestern cities toward the suburbs, the South and the Far West changed, perhaps forever, many of this country's well-established business patterns. And book publishing was not immune from the movement.

A review of the U.S. Department of Commerce's *Census of Manfacturers*, covering the years 1977, 1982 and 1987, reveals a dramatic increase in book publishing activity in the South and the Far West, while corporations in the Middle Atlantic, Midwest and New England regions experienced a decline.

Al Foreman, chief of the Publishing Section of the U.S. Department of Commerce's Census Bureau, says that the figures "capture reliable data from companies that meet a minimum standard of business activity." This means that "a firm must have: (1) an employer identification number; (2) at least one paid employee during the year; and (3) book publishing as its primary business function." While there are more than 20,000 book publishing firms in the country, as evidenced by books listed in *Books in Print*, the Census yielded information on 2,298 corporations; the other 18,000 firms did not meet these minimum standards.

For well over a century the Middle Atlantic area housed the largest concentration of book firms. This was readily evident in 1977, when almost one out of every three companies were located in this section of the nation. By 1987 only one in four corporations called this region home, with the Midwest, formerly second, a distant third. Table 1 outlines the growth in the number of book pub-

TABLE 1

BOOK PUBLISHING IN THE UNITED STATES

Regional Market Share of Establishments 1977–1987

Region	1977	Percent of Total	1982	Percent of Total	1987	Percent of Total	Percent Change 1977–87
USA	1,426	—	1,710	—	2,298	—	+61
New England	99	6.94	138	8.07	164	7.14	+66
CT	34	2.38	48	2.81	56	2.44	+65
MA	65	4.56	90	5.26	91	3.96	+40
Middle Atlantic	467	32.75	508	29.71	579	25.20	+24
NJ	75	5.26	91	5.32	112	4.87	+49
NY	356	24.96	367	21.46	398	17.32	+12
PA	36	2.52	50	2.92	69	3.00	+92
South	147	10.31	200	11.70	295	12.84	+101
FL	50	3.51	62	3.63	86	3.74	+72
MD	25	1.75	33	1.93	55	2.39	+120
TN	18	1.26	32	1.87	47	2.05	+161
Midwest	263	18.44	283	16.55	381	16.58	+45
ILL	105	7.36	120	7.02	135	5.87	+29
IND	19	1.33	21	1.23	32	1.39	+68
Far West	287	20.13	405	23.86	635	27.63	+121
CAL	239	16.76	266	15.56	375	16.32	+57
TEX	45	3.16	63	3.68	100	4.35	+122

Source: U.S. Department of Commerce, Bureau of the Census, *Census of Manfaucturers*, 1977, 1982 and 1987.

lishing establishments between 1977 and 1987.

The Value of Shipments

The value of shipments is a critically important economic component in any analysis of the book publishing industry. While the Middle Atlantic states sustained a sharp decline in market share in some categories, it was in this niche that these well-established states continued to exhibit great strength and resiliency, while development in the Midwest was not as impressive. The Far West, on the other hand, showed great fiscal gains, quickly closing in on the Midwest. New England was basically flat, unlike the South's upbeat performance. Table 2 provides an overview of these trends.

What collective impact will these various trends have on the U.S. book publishing industry? Obviously, many people feel they are insignificant, that book publishing will always be anchored in the four principal centers. According to their way of looking at the book scene, publishing could not survive if the traditional circle were broken and the industry dispersed to other regions.

The best study ever to investigate these matters was the influential book by Lewis A. Coser, Charles Kadushin and Walter W. Powell, *Book: The Culture and Commerce of Publishing.* Coser and his associates reported that "circles in [book] publishing seem far more dependent on the characteristics of the circles of authors than anyone might have suspected . . . ." As for trade editors who cling tenaciously to the belief that they must have easy access to their network and connections, Coser refuted this belief. "Trade circles are more sparsely connected than is suggested by the attention that trade editors give to them . . . [Editors] compensate for the spareness of ties among intellectuals, authors and themselves" with parties, gala events at the ABA show, and so on, the authors found.

What prompted an owner or corporate officer to either move a book house out of one of the principal centers or to launch a new one in the South or the Far West? A review of the published literature reveals a plethora of studies and theories.

The following forces are almost always significant considerations in the decision to relocate a business: (1) an attractive commercial real estate and housing market; (2) impressive cultural and educational institutions; (3) cost issues (energy, taxes, etc.); (4) transportation and distribution factors; and (5) various miscellaneous issues (the quality of the labor force, the city or state's crime rate, the real or potential impact of budget cuts or services, ease of doing business, "pro-business" or "anti-business" attitudes of state and local governmental units, the residence of the owners or key executives, etc.).

Can anything be done by the long-established publishing centers to staunch the flow away from them? Clearly, city leaders would have to address two pivotal and complex issues: (1) ascertain the existing business or "cultural" forces that compel publishers to remain within any of the traditional centers; and (2) determine the intensity of the forces at play that encourage a firm to leave.

Regrettably, there appears to be no book industry study underway investigating these complex issues. So industry observers can expect to see steady if not dramatic increases in the market shares held by Southern and Far Western book publishers throughout the 1990s and into the 21st century. □

Greco is an associate dean and director of publishing studies at New York University's Gallatin Division.

TABLE 2

BOOK PUBLISHING IN THE UNITED STATES

Regional Market Share Value of Total U.S. Shipments

(Millions of Dollars) 1977–1987

Region	1977	Percent of Total	1982	Percent of Total	1987	Percent of Total	Percent Change 1977–87
USA	4,049.9	—	6,645.6	—	12,619.5	—	+212
New England	329.7	8.14	538.8	8.11	1,017.9	8.07	+209
CT	29.1	0.72	—	—	144.5	1.15	+396
MASS	300.6	7.42	538.8	8.11	873.4	6.92	+191
Middle Atlantic	2,217.3	54.75	3,757.2	56.54	6,829.5	54.11	+208
NJ	129.6	3.20	373.1	5.61	701.7	5.56	+441
NY	2,008.8	49.60	3,271.0	49.22	5,923.4	46.94	+195
PA	78.9	1.95	113.1	1.70	204.4	1.62	+159
South	51.6	1.27	20.2	0.30	694.6	5.51	+1,246
FL	15.6	0.39	—	—	91.7	0.73	+488
MD	36.0	0.89	20.2	0.30	61.4	0.49	+71
Midwest	681.6	16.83	881.9	13.27	1,605.3	12.72	+136
ILL	589.1	14.55	881.9	13.27	1,149.8	9.11	+95
IND	51.8	1.28	—	—	—	—	—
Far West	243.7	6.02	418.4	6.30	1,136.5	9.01	+366
CAL	201.1	4.97	347.5	5.23	754.9	5.98	+275
TEX	42.6	1.05	70.9	1.07	235 .8	1.87	+454

Source: U.S. Department of Commerce, Bureau of the Census, *Census of Manfauctures,* 1977, 1982 and 1987.

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Publishers Weekly (ISSN 0000-0019) EPUSA 123397657 is published weekly, with the exception of the last week in December and with additional issues in January and February and with a combined July 20 and July 21 issue. Published by the Cahners Publishing Company, a Division of Reed Publishing USA, 275 Washington St., Newton MA 02158-1630. Terrence M. McDermott, President/Chief Operating Officer; Frank J. Sibley, Executive Vice President; Robert T. Brawn, Sr. Vice President/General Manager; Jerry D. Neth, Senior Vice President/Publishing Operations; J.J. Welsh, Senior Vice President/ Finance; Thomas J. Dellamaria, Senior Vice President/Production and Manufacturing; Ralph Knupp, Vice President/Human Resources. Circulation records are maintained at Fulfillment Corp. of America, 205 West Center St., Marion, OH 43302. Second Class postage paid at New York, N.Y. and additional mailing offices. **POSTMASTER: Send address changes to PUBLISHERS WEEKLY, P.O. Box 1979, Marion, OH 43306.** All editorial and advertising correspondence should be addressed to the office of publication: PUBLISHERS WEEKLY, 249 West 17th St., New York, NY 10011; telephone: 212/645-0067; telex 12-7703; fax: 212/242-7216. Address circulation correspondence and changes of address to PUBLISHERS WEEKLY, P.O. Box 1979, Marion, OH 43305 telephone 1-800-842-1669; in Canada and all other countries, telephone: 1-614-382-3322. Printed in USA.

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SUBSCRIPTION PRICES: U.S.A.: 1 year $119, 2 years $190, 3 years $279. Canada: 1 year $177, 2 years $301, 3 years $425. Air Delivery to all other countries: 1 year $260, 2 years $442, 3 years $624. (Remit in U.S. funds only). Single copies are available at $5.00 for regular issues and $10.00 for Announcement issues. PUBLISHERS WEEKLY is a registered trademark of Reed Properties, Inc., used under license. ☐ Specialized Business Magazines For Building and Construction, Research, Technology, Electronics, Computing, Printing, Publishing, Health Care, Food Service, Packaging, Environmental Engineering, Manufacturing, Entertainment, Media, Home Furnishings, Interior Design and Lodging. ☐ Specialized Consumer Magazines For Childcare, Boating and Wedding Planning.

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